

Conference Abstract

# Digitization Planning for Large Collections and Agencies with Specify 7

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## Abstract

The [Specify Collections Consortium \(SCC\)](#) supports research collections around the world with an intuitive, robust, and highly-customizable software platform to digitize their holdings and manage their collections. For over 25 years, Specify has provided and sustained biological research museums and biorepositories with software for managing, integrating, and publishing collections information (Fig. 1).

The SCC has increasingly engaged with very large collections managed by institutions ranging from universities to individual government departments to entire federal agencies, to envision a framework that supports standard computerization workflows and best practices. From our involvement in working with these institutions, which have successfully navigated the transition to Specify, we have gathered insights and learned lessons that may be helpful to others to better anticipate and address key data-related issues in their own institution when embarking on a Specify (or any collections management system) implementation.

Understanding how to approach data preparation for import into a collections management system is crucial, as collections often face significant challenges in this area. We will discuss some of the key hurdles that collections encounter and methods to overcome them such as unstandardized data within a single collection and between multiple collections, unparsed names for taxonomy and people, and reconciling pre-existing custom data structures with the fixed structure of a collections management system.

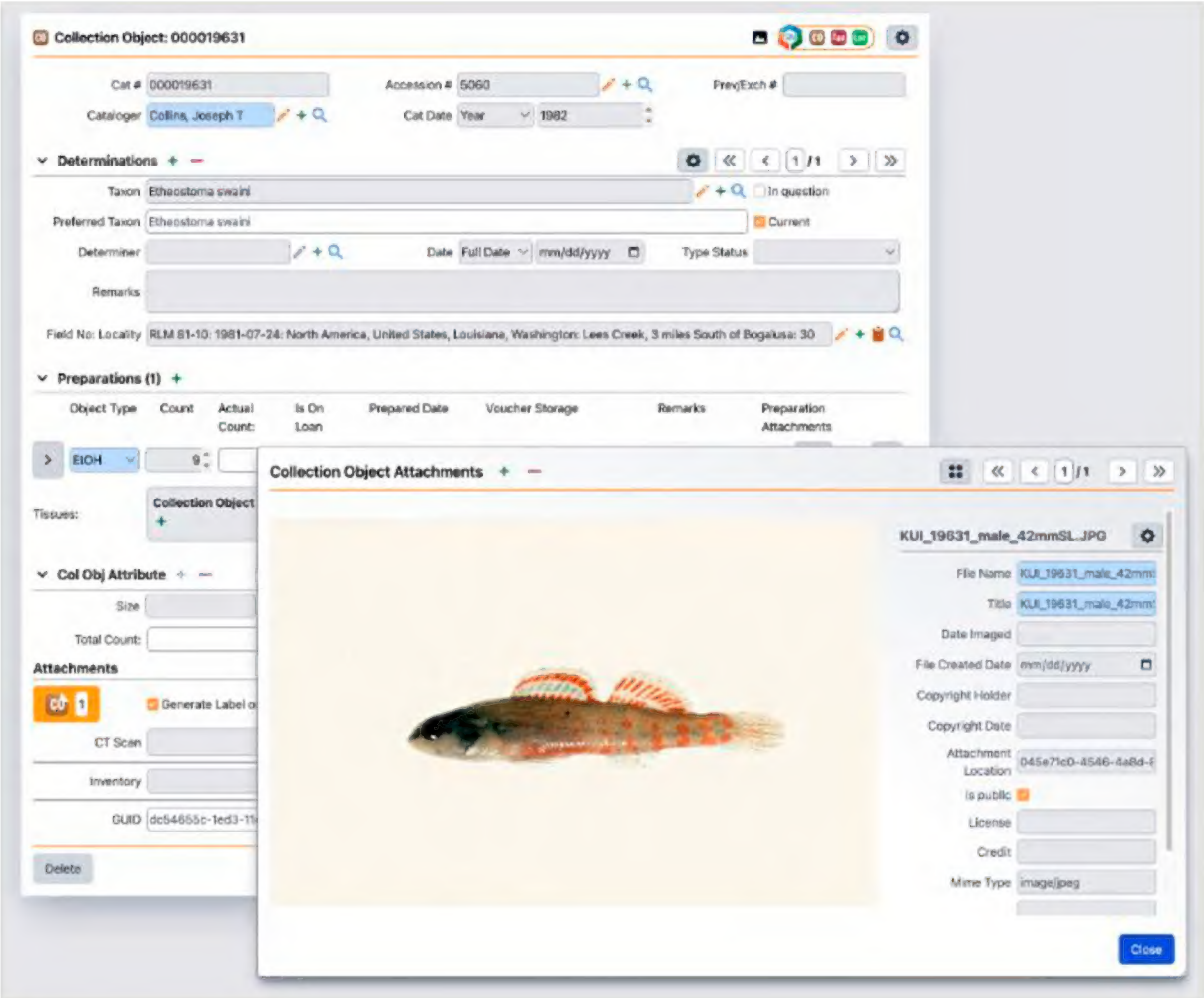


Figure 1.  
Specify 7 sample collection object form and attached image.

We will also cover the decision-making process for determining what collection data should be shared between collections versus what should be managed separately (scoping, data sharing, and data exporting). Large institutions often have multiple collections with diverse needs, and finding the right balance between centralized coordination and individual collection autonomy can be complex. The presentation will discuss the factors considered and the strategies employed to navigate this balance, as it can have significant implications for the overall success of a Specify deployment (Fig. 2).

Institution	Natural History Museum							
Division	Vertebrate Zoology				Botany			
Discipline	Ichthyology		Herpetology		Non-Vascular Plants		Vascular Plants	
Collection	Wet	Dry	Amphibians	Reptiles	Mosses	Lichens	Herbarium	Pollen

Figure 2.  
Specify 7 institutional hierarchy. This is an example of how an institution may decide to separate their data within a single database using Specify 7.

In addition to the technical considerations, the presentation will also delve into the human side of transitioning to a new collections management system. Successful collections management platform implementations require not only technical expertise, but also

effective communication and collaboration among the collections staff, volunteers, and management.

This presentation offers a framework to help other large collections successfully transition to Specify. Our team at the Specify Collections Consortium has extensive experience in supporting the transition of large research collections to their robust and highly customizable software platform. We have gained valuable insights into the key challenges and best practices for data preparation, system implementation, and change management. By sharing the lessons learned from these institutions and the SCC's experience, the presentation provides valuable insights and guidance to support other organizations in their collections management system implementation projects. A better understanding of this process will ultimately contribute to preserving and improving access to natural history collections (and soon geoscience collections) worldwide.

## **Keywords**

Specify Collections Consortium, SCC, collection management, collection management software

## **Presenting author**

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## **Conflicts of interest**

The authors have declared that no competing interests exist.